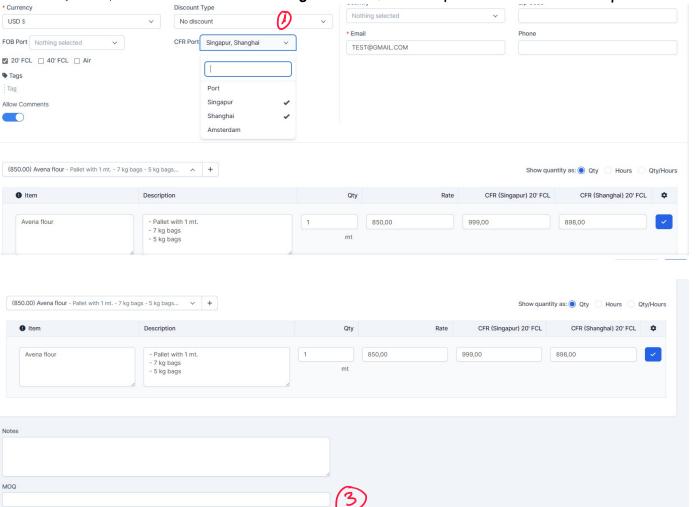
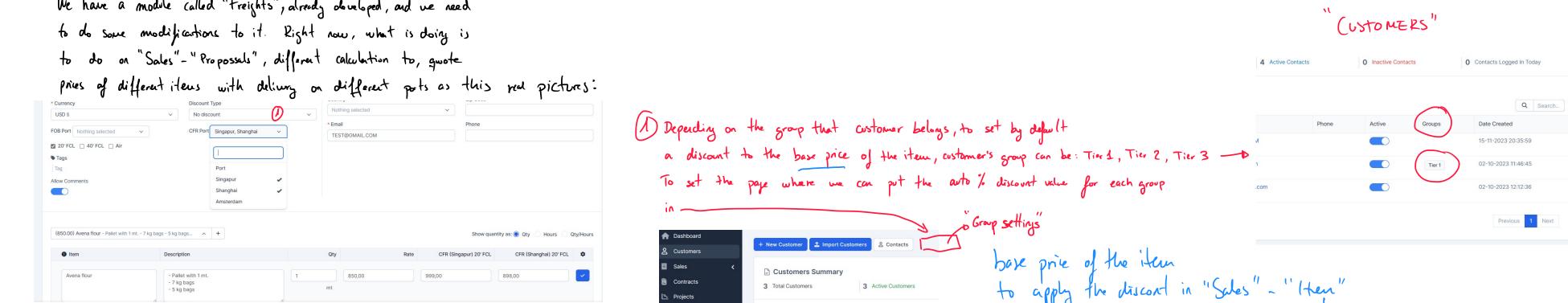
PERFEX CRM

We have a module called "Freights", already obveloped, and we need to do some modifications to it. Right now, what is doing is





2) Here we need to put the field "Shipment period" and: Shipment period has to be auto filled taking into account "Open till" date, for instances if Open

till is 25/12/2023, then Shipment period has to show: "January 2024", it's taking day 25 of December adding 15 days, so we are in January, that why systems calculate January 2024, if we are in 10/12/2023, then should write: December 2023.

This can be manually edited by me, so systems write for example "December 2023", but for that proposal I decide to change it manually to whatever text.

3 MOQ

MOQ field, already existing in proposal, by default has to show the quantity that can be loaded on the first item added on that proposal, and column, for instances item 1 on a 20FCL, if its 17.5 mt, then has to show on the MOQ field 17.5 this number can be found in "Sales" - "item" This field can be edited manually on each proposal.

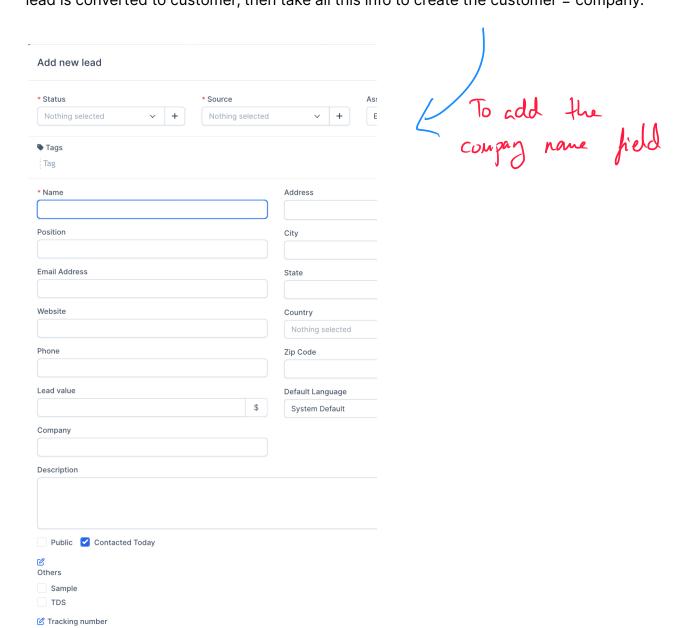
Add on the bottom of the pdf, which is the total quantity that can be load of each item per size of container quoted, if I quote 20'fcl and 40'fcl of item 1, then show a legend on the bottom of the pdf, with the max capacity that can be loaded. This info can be found on Sales – Items – "item". Just show 20'fcl and 40'fcl options, don't show AIR.

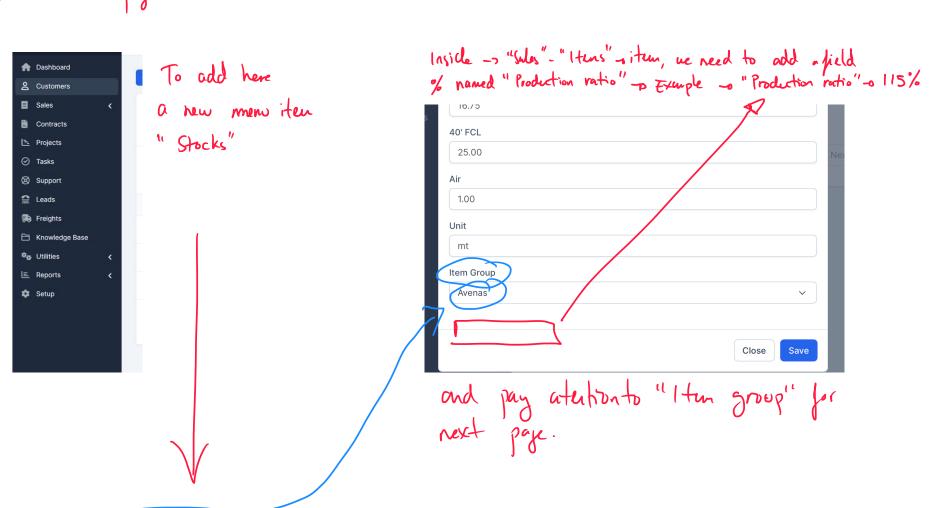
User's permissions, to be able to give different permission to staff members, to see, create, edit, delete, etc... proposals, or to convert to invoice, etc... so, some of them can see proposals, and add comments to the proposals, but can edit, convert to invoice, or delete. Etc...

When a "Open date" of a proposal has already pass, when someone of the staff want to create an invoice, a message has to appear saying that the Validity day already pass, if they are sure to proceed? then we can click yes and proceed to create invoice, or no, to cancel de convert process.

Reports – Sales – Items report (Is not working, please fix it) If a Proposal has not been converted yet to Invoice, to send automatically and email to the customer reminding him that the validity day is about to expire. This template has to be easy to modify by us, so put in on Setup – Templates, and also I need to put a list of emails of members of the team that will be also receive the email in CC.

When creating a LEAD, to be able to put the COMPANY NAME also, address etc... if this lead is converted to customer, then take all this info to create the customer = company.





inside "stocks", ne will show a table with the total quartity available of item groups. For example: Averas - Coffes - Oranges 4.567,80 2.250,20 300,52 This quantities, are coming from inside of each item group page. So we need to click in "Avenus", and exter in "Avenus" page where we can exter values and adjust manually the value.

" Stocks"

" Avenes Paje Excuple Total quantity (this is the sum of the table below) notes (Text input) not mendatory - We will add, quartitles manually to this table, except invoiced, invoiced, is outomatically line added to the table with negative quartity because has to remove port of the stock when lue invoice a proposal, depending the item will reduce différent ratio. Example, we invoice 10 mt of "Avera flor" issille de item "Aven flor" the "Production ratio" is 115% means the for 1 unit of this item will consume 1'15 unist of stock. So 10 mt x 1'15 - 11'T mt will be consumed and reduced of the stock. Gmt = metric tone - Inside "Avenas" Page, to add on top, "limit value, so me can set a l'avit, for example: 2000 mt, which were when the stocks are below that number and we are creating a "proposal" with an item belonging to that group, system should warn me

of low stock, then I dick "ok", and I can do the proposal, but at least I know the problematic situation of the stocks.

× ×

No discount

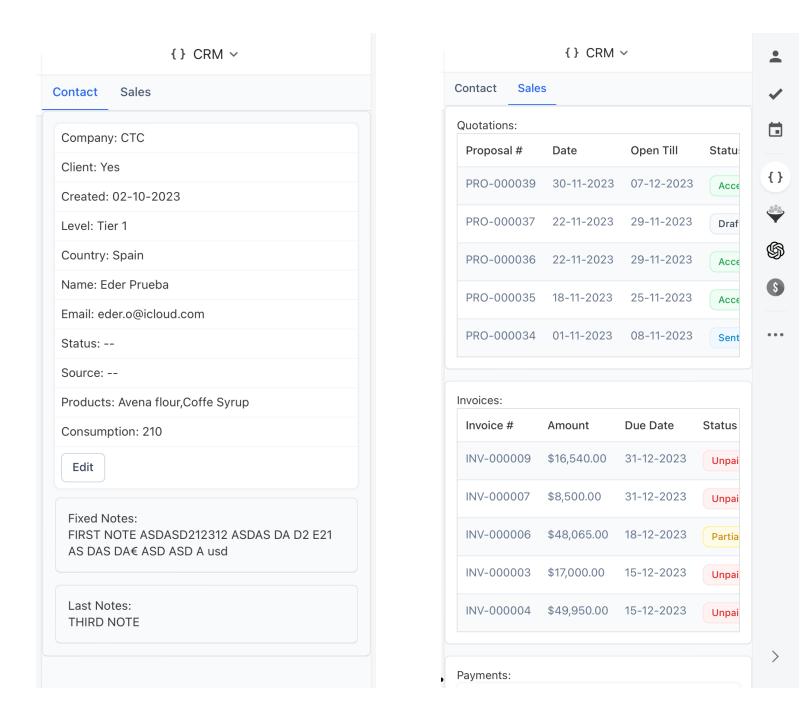
Singapur, Shanghai

**FOB Port** 

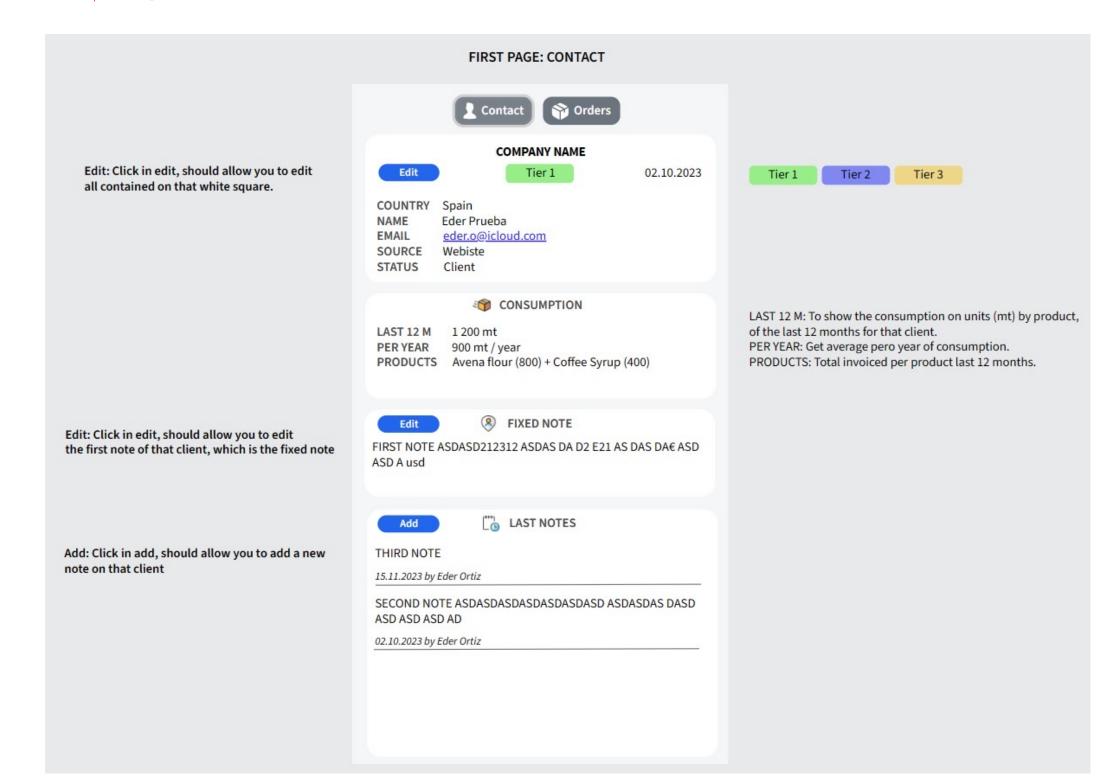
Nothing selected

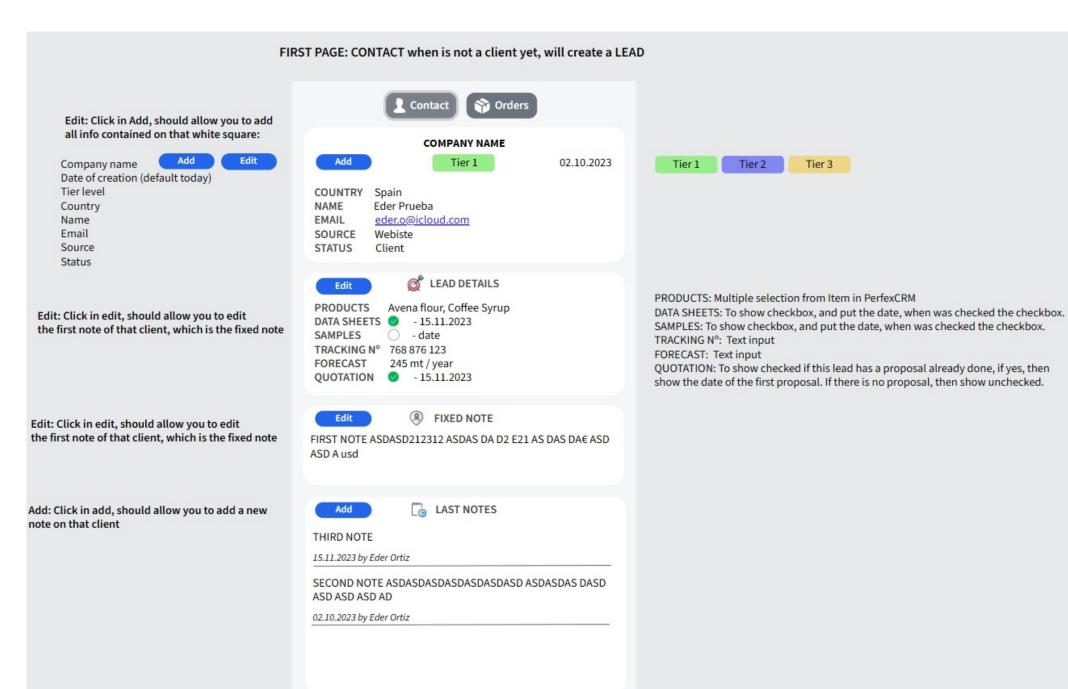
MISSIF APP

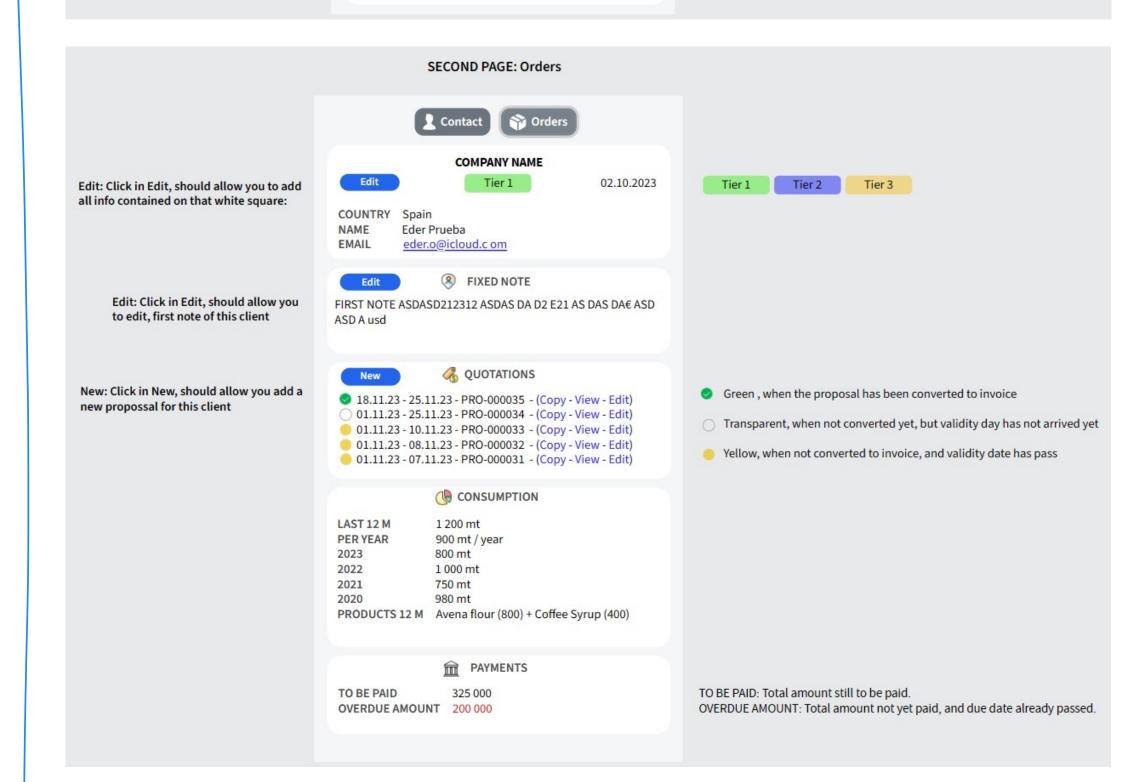
Now we have connected our Perfex CRM with Missive APP, through a modifications, and mainly to style it better, What we have now



What we need







You will need to doubted for free "missive app" to test it

https://missiveapp.com/integrations/iframe -o More info

https://missiveapp.com/help/api-documentation/iframe-integrations